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FPA to refresh advisor search for AI age with Snappy Kraken
By Rob Burgess
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Members of the Financial Planning Association will soon have a revamped tool for client acquisition. On Wednesday, the membership organization and trade association announced it would update and relaunch its FPA PlannerSearch platform in partnership with marketing technology company Snappy Kraken.

Slated for a summer launch, the new platform will be a data-driven lead engine — one that is able to filter by specialization and philosophy, said FPA CEO Dennis Moore.

Dennis Moore is the CEO of the FPA.
Courtesy photo

It will be engineered using structured data to help prospects more easily find advisors via artificial intelligence search results. The current service, active for around two decades, has been little more than a static directory, he said.

"We want to be able to bring more value to our members," he said. "We're looking for what always adds value, and this was one of the big tools that we wanted to enhance."

To be included on the platform, advisors will need to be a member in good standing of the FPA, as well as a CFP mark holder. The FPA currently has around 17,000 members, about 6,000 of whom are listed in the current directory.

Moore said the update is one aspect of the FPA's strategic growth plan, which also included its new AI education platform FPAi Authority, launched last month. Partnering with Snappy Kraken on this initiative, he said, "just made sense" because of the firm's market leadership.

"We've had a good relationship with them over the years, and we were talking with them and exploring ideas," he said. "The synergies were there."

Snappy Kraken CEO Robert Sofia said in a statement, "FPA PlannerSearch has earned the credibility, and now with the right data and engagement engine, it can become the highest-trust pathway for consumers to find a CFP professional and generate measurable growth for FPA members."

A group of beta testers, composed of FPA members, will offer feedback on the platform during its development, said Ben Lewis, FPA's chief communications and development officer.

"Our plan is to [provide] periodic updates throughout the entire process to keep our members in the loop," he said.

Reaction to the planned upgrades

The partnership reflects a broader shift in expectations, said David DeCelle, co-founder of prospecting platform WealthReach: Consumers are no longer willing to sort through long lists of credentials and hope for the best.

"They want to understand who an advisor is, who they serve and why that advisor is the right fit before they ever make contact," he said. "That behavioral reality puts enormous pressure on advisors to have a differentiated, clearly communicated value proposition rather than a generic profile that blends in with everyone else."

Up to this point, advisor discovery platforms have largely failed to keep pace with how consumers actually make financial decisions, said William Trout,

director of securities and investments at technology data firm Datos Insights.

"PlannerSearch has functioned as a static yellow-pages-style directory — useful for basic credentialing verification but offering little to help a consumer understand why one CFP professional might be better suited to their situation than another," he said.

The FPA's revamped tool, which will integrate behavioral matching, lead scoring and so-called automated nurturing, signals a genuine architectural upgrade, Trout said, and is likely to move the platform "closer to what NAPFA, XY Planning Network and SmartAsset have been doing for years, albeit with varying degrees of commercial intent and consumer trust."

Upgrading the infrastructure for discovery is valuable, said DeCelle, but the advisors who will see results will be the ones who combine a strong digital presence with a structured approach to client onboarding, "one that accounts for the fact that most prospects need multiple meaningful touchpoints before they are ready to commit."

"Technology is the door," he said. "The advisor's story, process and follow-through are what determine whether that door gets opened."

AI search results an important consideration

AI search visibility is an essential component in the platform upgrades, Trout said, as more consumers use conversational search tools to ask questions like, "How do I find a financial planner who specializes in divorce?"

"The traditional SEO logic of directory listings breaks down," he said.

Snappy Kraken's push to embed content and structured data into FPA member profiles is a reasonable hedge, though execution will determine whether it meaningfully improves discoverability or simply adds content noise, said Trout. The matching methodology itself is less clear, and the quality will depend on how richly planners populate their profiles — and how honestly consumers articulate their needs — "two historically weak assumptions in this category," he said.

"The firms that have done this best, like SmartAsset on the paid referral side, have used economic incentives and performance feedback loops to drive advisor participation," he said. "It will be worth watching whether FPA and Snappy Kraken can replicate that dynamic within a membership association context where the relationship norms are different."